

## **Rounding Like You Mean IT**

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Head, More Disruption Please Ecosystem, athenahealth

# Acknowledgements

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Principal

# Agenda

- 1 Context and Purpose
- 2 Approaches and Techniques
- 3 Case Studies and Results

# A Very Different World Today...

## Forces of Change in the Digital Transformation Age

# 1

**Complexity** of technology is increasing

Modern IT landscapes are increasingly complex; CIOs must help organizations embrace new tools at an unparalleled pace, and at the same time manage legacy technologies.

# 2

New demands on IT to deliver a **consumer like experience**

Demands from end users who often have access to better technology outside the workplace have never been higher, creating a constant threat of Shadow IT.

# 3

Business is expecting IT to be more **strategic**

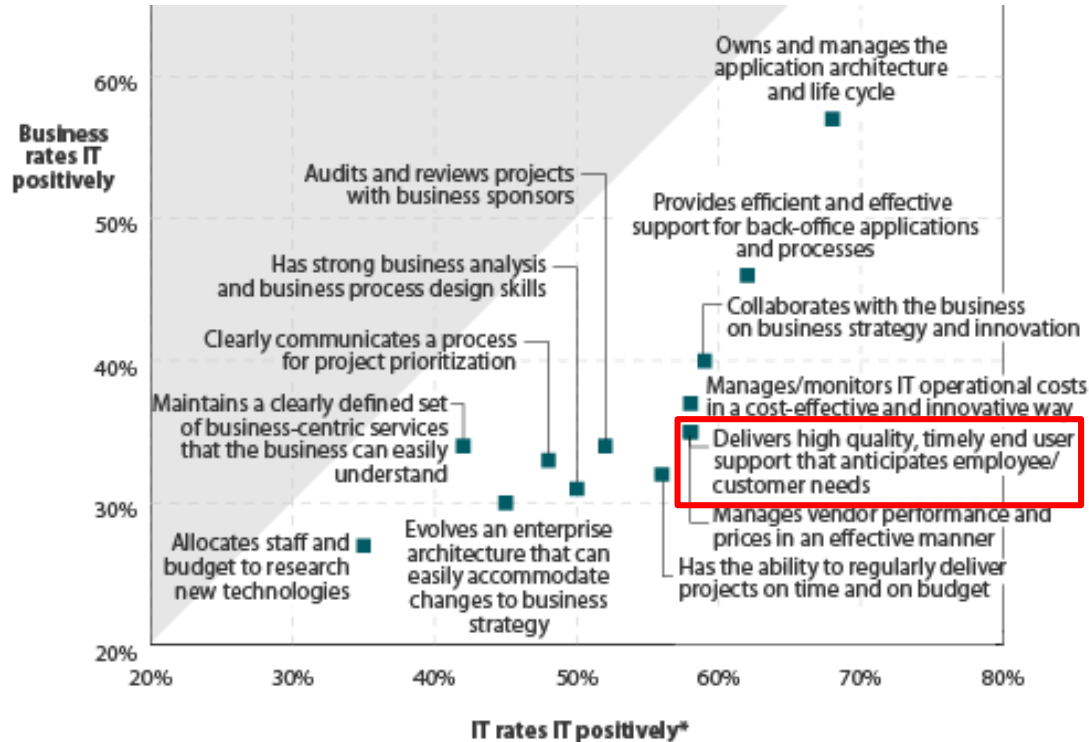
Expectations from the business for digital transformation grow. Organizations relying on IT to track and improve quality and safety metrics and to offer new ways of care delivery.

# Rising Importance of the “Customer”

## Customer Centric Mindset a Must to Thrive in the Digital World

Technology, although crucial, is just a tool. Any organization that wants to make the most from systems and services must focus on the people that will use IT. To meet this aim, the **modern IT department must be customer-centric.**

# Where We're Coming From...



Base: 1,004 North American and European business decision-makers in firms with 1,000+ employees  
 \*Base: 1,047 North American and European IT budget decision-makers in firms with 1,000+ employees

“Caregiving isn’t what burns physicians out—it’s the soul-crushing click, click, click.”







# What We're Hearing...



## MD FROM OREGON

"26 clicks to refill a medicine with 3 different passwords!"



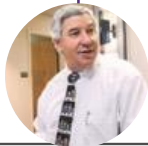
## STUDENT FROM WEST VIRGINIA

"It took me 30 minutes to figure out where to chart output. This is a problem. I'm a millennial. I know computers."



## MD FROM CALIFORNIA

"I am one expensive data entry clerk!"



## MD FROM TEXAS

"The EMR is built for the billers and coders and not for the healthcare providers."



## MD FROM FLORIDA

"We have lost that intimate relationship with our patients & the art of medicine...Instead we are turned into robots"

# 49%

of doctors' office time is spent in  
EHR documentation

# 77

notification "ping"  
distractions per day, per PCP.

---

# 158.4

hours spent by doctors on administrative tasks per year



**8 mins**

Is the average visit time

# Igniting the Shift to Customer Centricity

“I want to know my end users better, but I don’t know where to start.”



Talk to your end users



Understand the role of empathy



Measure how your end users think and feel about your IT services



Design customer experiences that matter

- 1 Context and Purpose
- 2 Approaches and Techniques
- 3 Case Studies and Results

# What is Rounding? An Evolution

PAST



Physician



Physicians make “rounds”—visiting patients to assess their conditions and plan care

PRESENT



Physicians



Nurses



Executives



Dept. Leaders



Dept. Staff



- Many different types of rounding have come into practice
- The term has been extended beyond patients to observations and audits involving others such as end-users, customers etc.

## Rounding for Outcomes (Studer, 2008)

**Proactively** engaging, listening to, communicating with, building relationships with, and supporting your most important **customers: clinicians, patients and families, staff, other departments** etc.

# What is a Gemba Walk?

**gemba** noun [ U ] /'gem.bə/ = “the real place”

*Japanese term used in lean manufacturing philosophy to indicate the place where value is created*

**現場** **Gemba walk** is the practice of going to the place where work is done, observing processes, and collaborating with staff for improvement.

Gemba Basics:



Go See



Ask Why



Show Respect

“When you go out into the workplace, you should be looking for things that you can do for your people there.

...

You’ve got to be looking for changes you can make for the benefit of the people who are working there.”

- Taiichi Ohno



# IT Rounding



**Gemba walk** to review interaction between **customers, technology, and processes** in real-time.

## Key Objectives



Gather real-time insights



Build relationships and connections



Surface improvement opportunities



Create engagement and awareness



Deliver prompt, personalized service



Build credibility for the IT department



**All IT staff must round.**

How else will we hear from front line users of the systems we implement and support? How else will we hear what really works and what doesn't? **How else can we stay grounded in our users' experience with the systems and tools they need to do their jobs?** How else can we understand what they need from us?"

*Sue Schade, Principal,  
StarBridge Advisors*



# Anatomy of an Ideal IT Round



## Before the Round

1. Identify area and location
2. Establish approach (general vs. focused)
- 3. Review recent tickets for the area**
4. Prepare responses to current issues



## During the Round

5. Be 100% present
- 6. Listen with empathy**
7. Show respect and demonstrate expertise
- 8. Communicate service commitment**
9. Manage expectations and timelines

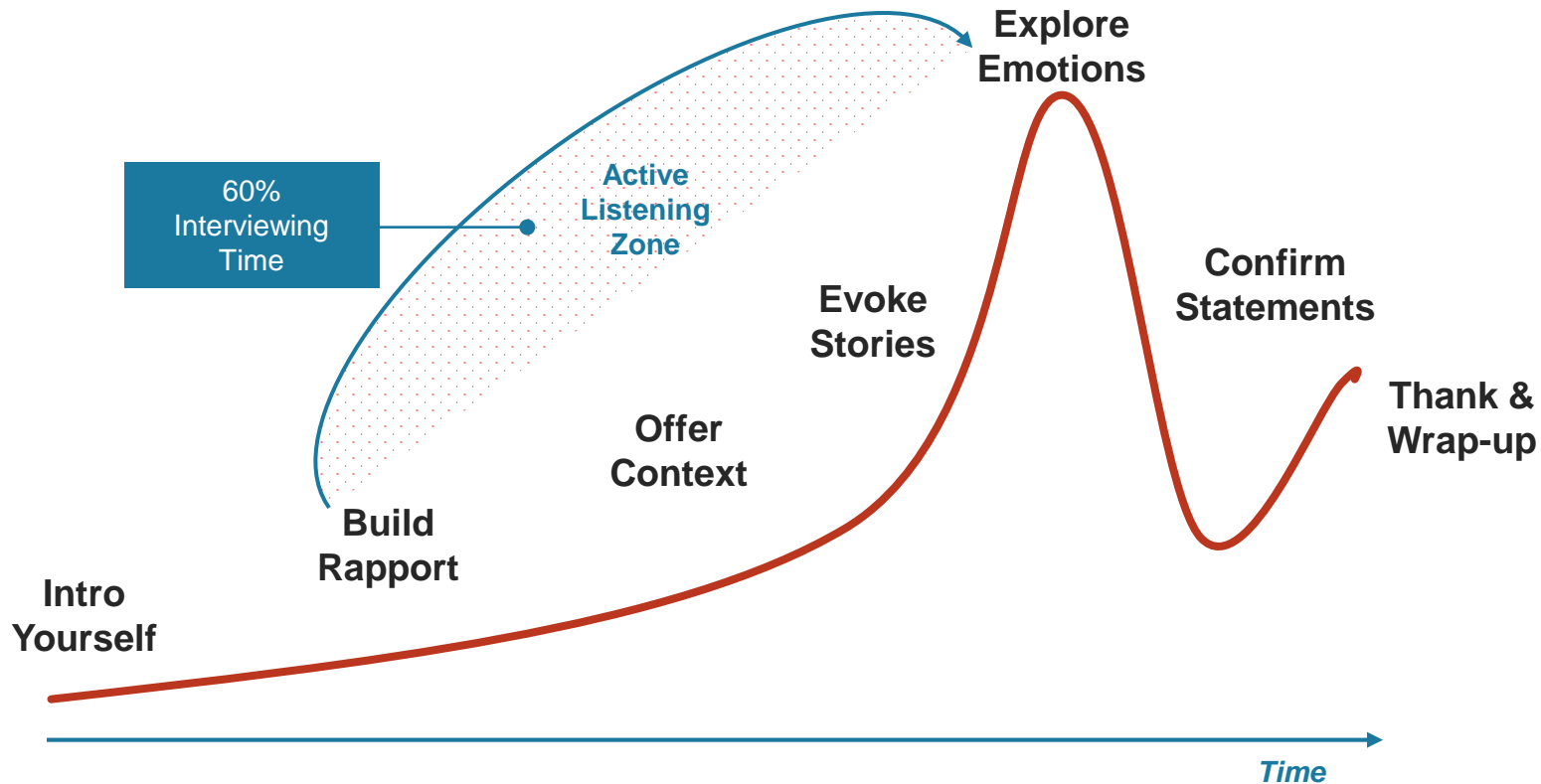


## After the Round

10. Send a *thank you* note where needed
- 11. Be responsive with follow through**
12. Follow up to assure gains are sustained

CLIMB IN THE HOLE.  
EMPA & NEVER  
THY SAY  
"AT LEAST."  
BRENE BROWN

# Empathy Interviewing



# The Credibility Equation

**Credibility** = **Earn Trust** + **Add Value**



✓ Listen with empathy

✓ Be sincere

✓ Be responsive

✗ Don't make excuses  
or pass on blame

✓ Do your research

✓ Demonstrate expertise

✓ Follow through

✗ Don't exaggerate or  
overpromise

# Setting Up the IT Rounding Program

## 1 Design the program to address specific goals; secure buy-in and designate resources; **everyone must participate, especially you the leader**

### Action Steps

- Define purpose, goals, and structure (approach, frequency and duration, target participation etc.) for the program
- Identify stakeholders, build buy-in for program within IT and with hospital leadership, and communicate initiative
- Designate responsibility for managing training, logistics, and communication between IT and hospital points of contact

## 2 Equip staff with necessary training and tools; start with active listeners; support participants, but ensure efforts are driven by the teams

### Action Steps

- Offer empathy training through new hire orientation and regular classes; encourage practice with videos, role-play, interview scripts etc.; provide tools for demonstrating service commitment and for capturing issues and feedback
- Establish standard for customer service; buddy-up less experienced staff with super users or colleagues where required
- For general rounding, allow participants a choice of location and clinical department according to their interest. Allow individual teams and IT leaders to take initiative for scheduling and facilitating focused rounding.


## 3 Establish follow-up expectations; **set up clear mechanisms to address action items and to measure participation and impact**

### Action Steps


- Follow up immediately on any items that clinicians need help with; establish protocols for coordinating communication within IT and externally with the customer; regularly collect customer feedback and track participation
- Encourage sharing and capturing of rounding stories in daily huddles, department meetings, and via an interactive portal



# IT Rounding Script from Stanford Health Care



**ITS Academy**



**Stanford**  
HEALTH CARE

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**Interview Rounding Script**

1. Connect and Introduce the team:  
(Ask: Do you have time to speak with us today? Add response for "no" answer.)

---

2. Communicate the purpose of rounding:  
2a. Assure importance of hearing their feedback and confidentiality if desired

---

3. Listen with empathy:  
3a. Provide positive feedback during conversation to convey listening  
3b. Imagine yourself in their position  
3c. When needed: Use "I apologize WE have not met your expectations."

---

4. Summarize & Exit:  
(S.T.A.P.L.E.) - [Summarize / Thank / Anything else? / (Pause) / Leave Behind / Exit]
  - 4a. Summarize your understanding and key points from the conversation
  - .
  - .
  - .
  - .
  - 4b. Summarize follow-up actions to be taken
  - .
  - .
  - .

---

5. Follow-up:  
5a. Send thank you email, (day of rounding)  
5b. Set calendar reminder for 10 days to check-in w/customer  
5c. Add self and customer to ServiceNow ticket to receive updates

## Key Elements of Training Script

Establishing Connection

Communicating Purpose

Using Empathy

Summarizing with S.T.A.P.L.E Framework

Following Up



## IT Rounding Training Script Template from SHC

Please see appendix for the full version of the framework

INC0010927 +

Incident - INC0010927

Submit Resolve Incident

Identification and categorization Investigation and diagnosis Resolution and recovery Closure

Number: INC0010927

Reported by: Denise Pittney

Reported for: Buffie Wuestewald

Business service: [ ]

Configuration item: [ ]

Category: Printing

Subcategory: Printer malfunction

Impact: 2 - Medium

Urgency: 1 - High

Priority: 2 - High

Short description: printer not functioning

Callback number: [ ]

Location Details: [ ]

Contact type: [ ]

Incident state: [ ]

Assignment group: Field Services - Ricoh Support

Assigned to: [ ]

Stanford's enhanced incident management workflow allows for logging and tracking issues identified during IT Rounds

Customized approach facilitates effective internal IT follow up and external follow through with customers

Incident - INC0014345

Update Save Bomgar Session Key Resolve Incident Delete

Encrypted Description (for PHI/PII)

Description

Notes Related Records Closure Information Record Information

Watch list

Work notes list

ADD PERSON YOU SPOKE TO

Enter email address

ADD YOURSELF TO FOLLOW

Enter email address

Additional comments (Customer visible)

Work notes

*\*\*Notes visible to customer*

*\*\*\*Notes visible to IT only*

# Measuring Rounding Impact

Sample Metrics
Goals and current results
Progress in initiatives
Review of accomplishments and areas requiring attention
Stop light report items and status
Thank you notes received
Employee testimonials
Employee recognition and stories at department / All-Hands meetings

“As you start getting out there and looking for problems and fixing them before they occur on the backend, you’re going to have fewer calls coming in... **You may not have your tickets going down because you’re finding a lot of things that people just don’t have the time to call for.** But what you’re doing is fixing problems and improving the reputation and the performance of the department.”

*Todd Richardson, CIO,  
Deaconess Health System*



# How Is IT Measuring Success?

IT Thinks ...	The Business Thinks ...
<b>Incident Volumes:</b> “Yay we have dealt with 4000 incidents this month”	“Oh, you have failed us 4000 times this month”
<b>First Contact Resolution:</b> “We have achieved a stellar 70% FCR rate in December”	“If you can’t help me, please pass me onto someone who can ... I don’t have 45 minutes for you to try things”
<b>Call Response Time:</b> “We answer 90% of calls within 20 seconds”	“Why does it take me 3 minutes to get through the interactive options before I speak to a human?” (FCR-driven?)
<b>Availability:</b> “We have 99.97% availability on critical services”	“It’s a shame the 0.03% is when we really need it to be working”
<b>Staff training:</b> “100% of our service desk agents are ITIL trained”	“I don’t need to ask them a question on ITIL I need them to help me. Yes, me the customer”

## Aiming for Satisfaction

“My most important KPI is customer satisfaction [of SAP employees]. Happiness is a competitive advantage; if we have happy employees, they will make our customers happy. This is a direct correlation. We need to put employee productivity at the center of our activities. The **key goal for every IT employee is customer satisfaction** and putting the user at the center. We want to excite them and inspire them.

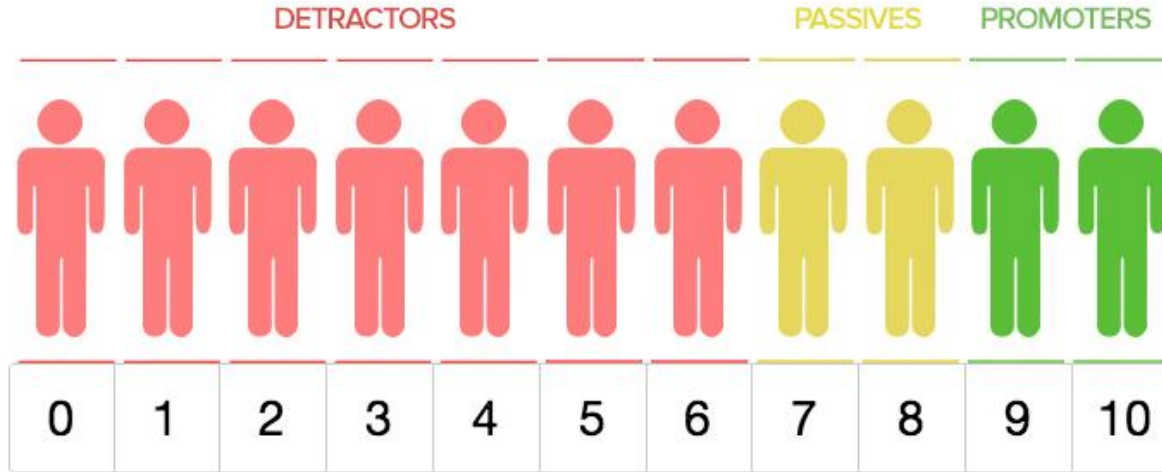
*Thomas Saueressig, CIO, SAP*

“[I have a] passion to figure out **customer-focused strategies as opposed to, say, competitor-focused strategies**. If you're competitor-focused, you tend to slack off when your benchmarks say that you're the best. But **if your focus is on customers, you keep improving**.

*Jeff Bezos, Founder, Chairman, and CEO, Amazon.com*

# Net Promoter Score

“IT Consistently Provides Me a Premium Experience”



minus



=

**NPS**  
SCORE



# The New Killer Internal Customer Experience Metric?

Time  
to  
Smile



# An Aspirational Goal: Journey Mapping

## What Does Delivering a Great End User Experience Mean?

The end user journey is the complete **sum of experiences** that end users go through when interacting with IT. Instead of looking at just a part of a transaction or experience, the journey documents the full experience of being a customer.

# From Touchpoints to Journeys...

## Seeing the World as Customers Do

Attitudes

Experience

People

Things

People

Things

ONSTAGE

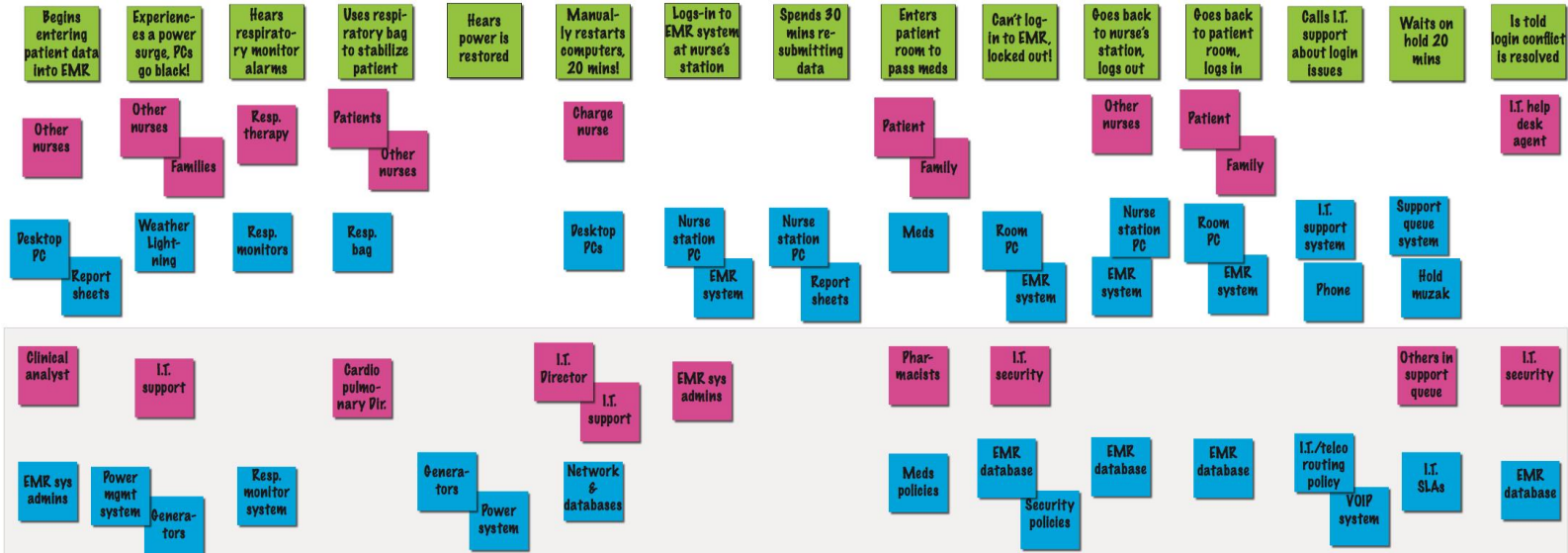
BACKSTAGE

BRAINSTORM



**Sharon ICU Nurse**

- 20 yrs nursing experience
- Enjoys family interactions
- Likes to stay busy
- Takes pride in providing high quality care
- Seen as a go-to person by many nurses & doctors



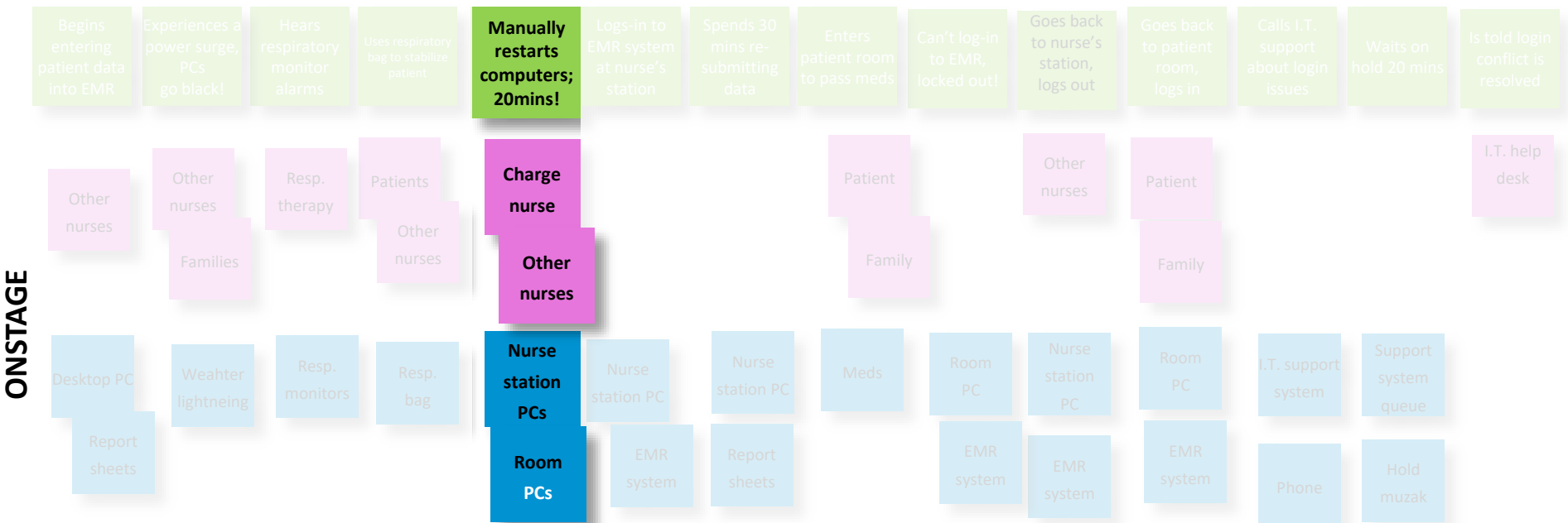
Source: Flores, R. (2016, December 3). Telephone interview; "How well do you know your end users?"; Citrix Synergy 2016 Workshop, May 2016, available at [https://www.youtube.com/watch?v=gSf3\\_3uM7-M](https://www.youtube.com/watch?v=gSf3_3uM7-M), accessed December 5, 2016.

Idea

# Knowing Processes Surrounding End User

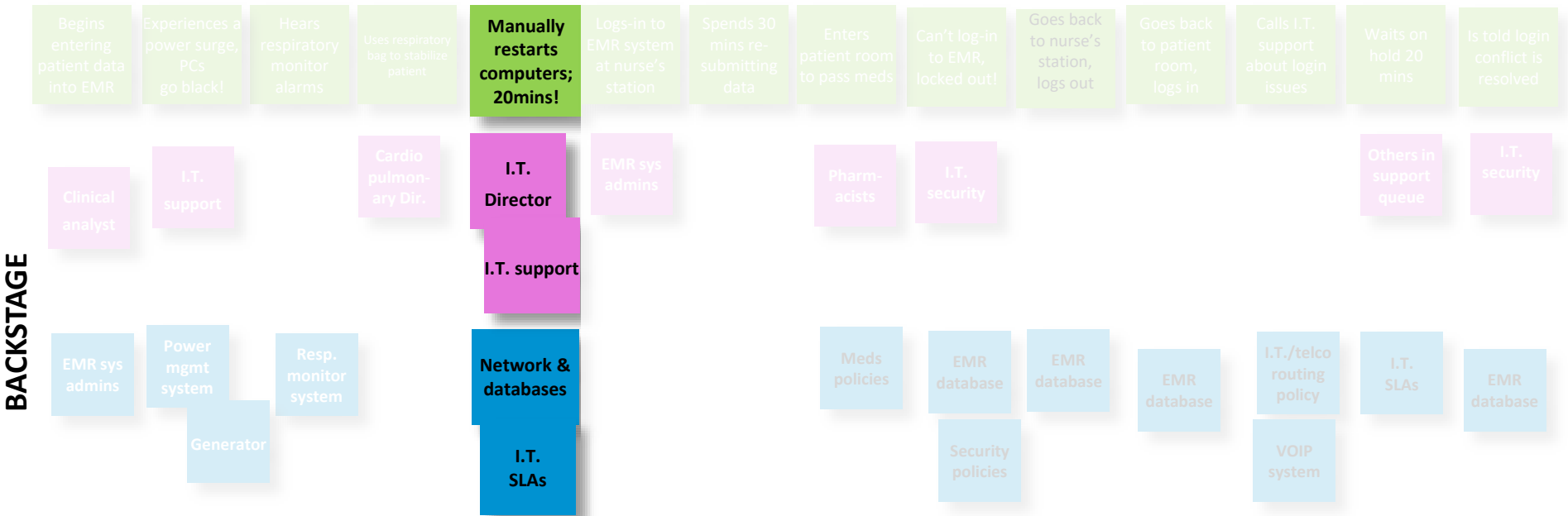
What and who did Sharon interact with during her experience?

People, processes, technology – “Onstage”



# Knowing Processes Surrounding End User

People, processes, and technologies that Sharon *didn't* come into direct contact with, but that still play a role in her experience – **“Backstage”**





# Not Without Challenges!

## Top Challenges IT Teams Face When Shifting to Customer-Centric Mindset



Connecting to end users



Busting silos



Changing the perception of IT



Engaging in non-technical, business terms

# WANTED: Business-Savvy IT Staff

“My guys are really smart, but when they press buttons, they forget there are people sitting on the other side of them.”

*Anonymous CIO*



100%

Gartner's estimate of IT roles that will require an intermediate level of proficiency in business acumen by 2020

## Strategies to help IT staff “learn the business”



Encourage staff to interact with users



Let IT staff work in a business area



Have analysts develop relationships with super users



Mentor and provide opportunities to shadow



Send staff to areas of greatest need



Make business education a goal

- 1 Context and Purpose
- 2 Approaches and Techniques
- 3 Case Studies and Results**

# NewYork–Presbyterian Hospital

## IT Rounding a Cornerstone of Customer Experience Efforts

### Key Program Features



#### Drives Top-Down Innovation



Reintroducing technology to business in a never-seen-before avatar a key IT innovation imperative



#### Dedicated, Enigmatic CX Executive

**Serves as face of IT and owns UX;** drives weekly IT Rounds and strives to **convert non-IT colleagues into IT advocates** by engaging in their terms



#### Employs Empathy

Staff hired for empathy or trained where required; “active listeners” encouraged to lead the IT rounds



#### Facilitates Bottom-Up Engagement

Keeping pulse on IT adoption and driving continual improvements to support operational goals



#### Focus on Experience – not Tickets

Staff get Ritz Carlton style training and are coached to represent all of IT; **provide follow up letters with “shopping cart” of issues & “fulfillment dates”**



#### Captures the Wins

Building on success and popularity to do more: setting up “Tech Stops” and creating mini commercials for apps



**Ensuring outstanding IT experience is my Job #1. We took bold steps to pivot from an internal-facing team to an external facing team.** We started really getting to know the business and spent time with our clinicians to understand how IT can complement care workflows. The result has been greater health care worker productivity and a new, digitally enabled model for patient care. We raised our IT employee engagement scores from **30 percent to 90 percent.**”

*Christine Ooro Singh,  
Director of Customer Experience*

# “Fulfillment” Approach and Expansion Plans

## NYPH’s Follow Up Approach

The screenshot shows a letter from the NewYork-Presbyterian Innovation Center. The header is 'I.T. Rounding'. The letter is addressed to the MH 6HN Unit. It includes a 'Who We Are' section, a 'What We Promise' section, and a 'Shopping Cart' table with three items: 'Install MS Word on all desktops' (due 6/5/16), 'Add audio to all the PCs' (due 6/5/16), and 'Improve Omnicell specimen printing' (due 8/12/16). The NYP TechStop logo is in the bottom left corner.

### Key Elements

Introduction and Context

IT Commitment to User Experience

Date and Location of the Round(s)

Executive Signature

List of Requests or Issues

**Fulfillment Dates**



**IT Rounding “Shopping Cart” Letter from NYPH**

Please see appendix for the full version of the letter

## TechStop by the Numbers

Inaugural TechStop launched in June 2016

**1,015**  
STAFF VISITS

**851**  
REQUESTS  
RESOLVED

**3,659**  
PATIENT VISITS

Next TechStop launching in Feb 2017

# Stanford Health Care

## Key Features of Stanford's IT Rounding Approach



**Articulates central philosophy in a few meaningful words:**

“Building loyalty through premium experiences” an IT imperative



**Supports central philosophy with core values:**

“C-I-CARE” service philosophy applied to internal interactions



**Makes core philosophy the focus of orientation:**

C-I-CARE and IT Rounding training offered to new hires



**Provides customer centric training and support:**

Staff equipped and encouraged to perform regular rounds  
Training and follow up metrics are captured and measured



**Makes it visual:**

IT Rounding Cards serve as visual touch points



**Reinforces commitment continually:**

Rounding stories shared at daily huddles and All-Hands meetings  
reinforce mission and inculcate higher sense of purpose



Informatics Education

**LeAnna Fries**  
Director

*I am committed to providing  
you with a premium  
CICARE ITS experience.*



**A little bit about me:**

- I lived in The Netherlands for 2 years, earning a graduate degree in Medical Anthropology.
- I strive to inspire through service, kindness, and positivity!
- My team and I are committed to exemplifying the service in IT Services.

**I will follow up with you on:**

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**Forgot something?**  
Call me at 650-736-2622, or  
Call our SHC IT Service Desk at 3-3333.

# Medical City Healthcare (formerly HCA North Texas)




## Case in Brief: “Partner Rounds” Program

- Program launched in response to survey results that surfaced IT related frustrations and pain points from nurses
- IT and nursing leadership deployed proactive rounding in the spirit of hourly rounding and Studer Group leader rounds
- A partner round is an **operational blitz** where IT and nursing staff all round on a unit together for proactive problem solving

### Physician Satisfaction

76.9% 2015  85.1% 2016

### IT Work Order Requests (Per Month)

1500 Before  52% fewer requests  
713 After

### Time Savings

 31,008hrs  
(Per Year)

Reduced high priority issues by 82.5% = 2,584 fewer patient impeding issues a month

### Employee Engagement

#### IT Engagement Ratio

3.06 2015  3.56 2016

#### % RN Engagement

78% 2015  79% 2016

“We took some of the Studer Group Nurse Leaders Rounding principles and we created Partner Rounding.”

*Leah Miller, Chief Information Officer*

“We (as in nursing) have struggled with IT in the past, and for the first time I can see and feel the difference it makes partnering with IT. When people can understand and relate to one another in their own environments, it makes all the difference in the world.”

*Cassidi Roberts, Chief Nursing Officer  
Medical Center of McKinney*

“Our patients are safer, nurses are happier, efficiency has improved and both disciplines have a greater understanding of the importance of their contributions.”

*Carol Gregory, Chief Nursing Executive*

# Establishing Visibility and Follow Up



## Partner Focus

*“Taking care of our nurses so they can take care of our patients”*

On *<date>*, the *<hospital name>* IT&S department conducted a Partner Focus visit on the *<unit name and location>*. The focus of the visit was to meet with the clinical staff discovering ways to help, while proactively resolving many IT-related issues. During our visit we learned about some of the technology struggles, replaced old equipment, cleaned monitors and medication carts, installed necessary software, or provided training to a member of the clinical team. It is our goal to provide the best equipment and service to the clinical teams, which will help to:

- **Reduce frustration levels when IT equipment fails to perform**
- **Increase clinician productivity**
- **Increase employee satisfaction**
- **Reduce calls to the Service Desk**
- **Let the clinical team focus on treating patients' first**

Thank you for the opportunity to partner with you in providing the best possible care to our patients.

## Key Elements of Follow Up Report

Details of the Partner Focus visit

Purpose and Goals of the visit

IT Commitment and Gratitude

**Results of the Visit**



## IT Rounding Sample Follow Up Report

Please see appendix for the full version of the letter



# Stanford Children's Health

## Actively Bridging the Divide with Service Liaison Led IT Rounding



### IT Service Leader Responsibilities

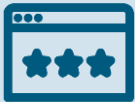


### Approach in Brief: IT Rounding by Service Leaders

- IT Rounding program designed to establish relationships and to “hunt for problems”
- Service Leaders assigned to key clinical areas in the hospital (Clinical Informatics Managers serve in Service Leader role for Nursing Units)
- Serve as single point of IT accountability for the area being represented and round at least 2x/week (Gemba rounds) in the unit/department
- Findings reported out to IT leaders on a weekly basis and manage accountability

# Mission Accomplished, and Then Some

## Anticipated Benefits



Improved customer satisfaction



Right-sized demand for IT services



Eliminated surprises

## Unexpected Gains



Demystified IT's role to business leaders



Drove more efficient use of IT



Improved technology deployment time

**himss** Analytics <sup>STAGE</sup> 7



## Value for IT and Operations

“I get to learn the business and find ways to help improve business processes utilizing IT solutions.”

*Pharmacy Service Leader*

“I don't think it would be possible for us to meet our mission without our Service Leader. He is integrated in our strategic discussions and decisions as we are very dependent on our IT resources.”

*Director of Pharmacy*

“Wearing my **IS hat**, I have the opportunity to do what I love with systems management, support and education. Wearing my, **radiology hat** I can remain closely connected to the patient care providers and continue to be a real part of patient care by supporting them & the applications they use on a daily basis.”

*Radiology Service Leader*

# Texas Health Resources

## Cultivating Compassion and Boosting Engagement through “Connections”



### Case in Brief: “Connections” Program

- Aims to connect “head to the heart” through shadowing opportunities and IT rounds
- Focus is on **“observing and learning”** workflows rather than on **“finding and fixing”**
- Accommodates employee choice and includes both clinical and non-clinical areas (for ex: clinical staff in IT get to round on data center)
- Employees participate monthly and submit online report within the week on their experience
- Project manager develops schedule and coordinates registration and site visits



### 10 Step Guide for Setting up Connections

Please see appendix for a simple How To guide from THR on setting up the Connections program

#### Clinician Engagement



“The clinicians who were shadowed learned more about technology. They learned IT cares and that they have an incredible support structure for them.”

#### Relationships and Credibility



“Respect from operational leaders increased because they saw that IT cared enough to take such action. Relationships were cultivated, creating a family-oriented culture.”

#### Business Outcomes



“While not scientifically validated, there appeared to be an overall correlation between organizational outcomes and Connections.”

#### Employee Engagement



“As Connections formed, employee sense of purpose, satisfaction of accomplishment, and commitment to community increased. IT employee engagement rose, creating and nurturing new talents.”

OUTCOMES

# Employee Transformation Testimonies

“I have worked here for 20 years and for the first time I realized we have patients.” *(Programmer)*

“I never saw myself as part of the patient care process until now.” *(Field Support)*

“Patient care was the core focus of every area. It was really great to see the patients and what we really work for. Rounding reminds us of what is truly important and why we do what we do” *(Security Analyst)*

“This is my second Rounding, and every time I get a much more vivid idea of how my contributions and duties make a difference and reaffirms the promise to our community and the people we serve.” *(Data Center Operator)*

“I run marathons. I was more exhausted shadowing a nurse today. I never knew.” *(Project Manager)*

“Given what I saw I can't begin to imagine how stressful their work must be. We need to do everything we possibly can to make it less so.” *(Vice President)*

# Ignite the Shift to User Centricity

## Support the People, Not the Technology



### Talk to your end users

#### Action Steps

- Engage patients, consumers & clinicians BEFORE starting a program or writing code
- Always close the loop. Always iterate.



### Understand the role of empathy

#### Action Steps

- Listen & understand (2 ears/ one mouth)
- Always put yourself in their shoes



### Design customer experiences that matter

#### Action Steps

- Use design thinking principles in your next challenge!
- Focus on experiences, not tickets.



### Measure how your end users think and feel about your IT services

#### Action Steps

- Benchmarks are important, but customer centricity more so. Start measuring satisfaction and experience.
- Proactive rounding works. Do it, now.

**Let the rounding begin!**



# Q&A and Contact Information



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**Santosh Mohan, MMCi FHIMSS**  
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On *<date>*, the *<hospital name>* IT&S department conducted a Partner Focus visit on the *<unit name and location>*. The focus of the visit was to meet with the clinical staff discovering ways to help, while proactively resolving many IT-related issues. During our visit we learned about some of the technology struggles, replaced old equipment, cleaned monitors and medication carts, installed necessary software, or provided training to a member of the clinical team. It is our goal to provide the best equipment and service to the clinical teams, which will help to:

- Reduce frustration levels when IT equipment fails to perform
- Increase clinician productivity
- Increase employee satisfaction
- Reduce calls to the Service Desk
- Let the clinical team focus on treating patients’ first

Thank you for the opportunity to partner with you in providing the best possible care to our patients.

**Results of the Visit:**

Item	#	Comments
PCs evaluated		
Keyboards Replaced		
Mice Replaced		
Tap-N-Go Readers/Badge Enrollment		
SSO Software Deployed		
Monitors Replaced		
Mouse Pads Replaced		
Printers/MedComm (mapped, labeled, cleaned)		
eTracker		
Scanners		
Phones Replaced		
Phone Cords Replaced		
Clinicians Trained on Systems		
Physicians Trained on Systems		
Cable Management/PC Labeling		
Patient Rooms PCs cleaned		
Validate Neuron Functionality		
Carts Cleaned		

**Action Items:**

Follow-up Item	Person Responsible	Due Date
<i>Item #1</i>		
<i>Item #2</i>		
<i>Item #3</i>		


If something was overlooked during the visit, please let me know so we can get it taken care of as quickly as possible.

Director IT&S

# Appendix 1: IT Rounding Report Template from Medical City Healthcare

# Appendix 2: Sample IT Rounding “Shopping Cart” Letter from NYPH

## I.T. Rounding

<p><b>Who We Are</b></p> <ul style="list-style-type: none"> <li>• NYP I.T. professionals regularly visiting staff and patients on location.</li> <li>• We serve as “boots on the ground”</li> </ul>	<p>Hello, from the Customer Experience team...</p> <p>We are thrilled to serve <b>MH 6HN Unit</b>, and look forward to building and supporting this relationship.</p> <p>Thank you for sharing with us the ways we can help make the unit more efficient using IT capabilities. Below is your shopping cart of items we are committed to delivering.</p> <p>Kind Regards, Customer Experience Team</p> <p>Signed: Christine Ooro, 7/20/2016</p>										
<p><b>What We Promise</b></p> <ul style="list-style-type: none"> <li>• We will commit to solving issues in real-time</li> <li>• We will deliver technologies that enhance the patient and staff experience</li> </ul> 	<p><b>Shopping Cart</b></p> <table border="1"> <thead> <tr> <th>Request</th> <th>Fulfillment Date</th> </tr> </thead> <tbody> <tr> <td>Install MS Word on all desktops</td> <td>8/5/16</td> </tr> <tr> <td>Add audio to all the PCs</td> <td>8/5/16</td> </tr> <tr> <td>Procure PDF converter (two licenses)</td> <td>8/31/16</td> </tr> <tr> <td>Improve Omnicell specimen printing</td> <td>8/12/16</td> </tr> </tbody> </table>	Request	Fulfillment Date	Install MS Word on all desktops	8/5/16	Add audio to all the PCs	8/5/16	Procure PDF converter (two licenses)	8/31/16	Improve Omnicell specimen printing	8/12/16
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Improve Omnicell specimen printing	8/12/16										

# Appendix 3: IT Rounding Script Template from Stanford Health Care

## Interview Rounding Script

### 1. Connect and Introduce the team:

**(Ask: Do you have time to speak with us today? Add response for "no" answer.)**

### 2. Communicate the purpose of rounding:

**2a.** Assure importance of hearing their feedback and confidentiality if desired

### 3. Listen with empathy:

**3a.** Provide positive feedback during conversation to convey listening

**3b.** Imagine yourself in their position

**3c. When needed:** Use "I apologize WE have not met your expectations."

### 4. Summarize & Exit:

**(S.T.A.P.L.E.) - [Summarize / Thank / Anything else? / (Pause) / Leave Behind / Exit]**

**4a.** Summarize your understanding and key points from the conversation

**4b.** Summarize follow-up actions to be taken

### 5. Follow-up:

**5a.** Send thank you email, (day of rounding)

**5b.** Set calendar reminder for 10 days to check-in w/customer

**5c.** Add self and customer to ServiceNow ticket to receive updates

## Appendix 4: 10 Step Guide from THR for Setting Up “Connections”

- Everyone must participate, especially you the leader
- Speak with your hospital leadership and identify points of contact
- Decide on a tool to use for registration and documents
- Develop a schedule and begin registration into clinical areas
- Allow employees a choice according to their interest such as ED, OR, Lab, Nursing, Pharmacy, etc.
- Spend a minimum of 4 hours shadowing
- Set up an interactive site to have employees post feedback on their experience
- Follow up immediately on any items clinicians need help with
- Send thank you notes to all clinicians involved
- Repeat

# Appendix 4 Contd: How-To Guide from THR on Customer Relationship Management

1. Identify all critical relationships
2. Assign team members to visit each person quarterly
3. Priorities:
  1. Develop relationships
  2. Understand strategies
  3. High touch customer service
4. Use a tool to gather and communicate results of meetings
5. Follow-up immediately on action items
6. Repeat

# Appendix 5:

## More Employee Transformation Testimonies from THR

- *"I must admit, I hated this idea but did it because I had to. I have worked here for 20 years and for the first time I realized we have patients. Of course I knew what we did as a hospital but really, this was incredibly impacting and I will never be the same."* (Programmer)
- *"I am not the same today as yesterday."* (Network Engineer)
- *"I volunteered to observe in the OB unit. With clinician and patient consent, I witnessed the birth of twin babies. I never realized all the behind the scenes coordination required and it opened my eyes to a whole new world."* (Admin Assistant)
- *"My life is changed. I always wanted to be care giver but didn't like blood so chose a different path in technology. Now I tell people I am both."* (Application Analyst)
- *"In one day I witnessed the joy of healing and the pain of death. I now see how critical IT is and why we need to be the best that we can be to support the front lines."* (Business Analyst)
- *"I am a nurse and did not see why I had to take part in Connections. After today, it was like I was hit by a ton of bricks! Wake up call! Thank you, thank you, thank you."* (Application Analyst)
- *"The experience is another reminder that the bigger picture of our health system, being a body of entities, departments and individuals, come together for the patients to have one more beat of life."* (Data Center Operator)
- *"The experience was one that I am very thankful to have participated in and I can't wait to do it all over again."* (Application Manager)
- *"There is a lot of new technology on the floor and it's cool to see how all the parts fit together to make the whole. People working with people and technology involved to make health care better."* (Business Analyst)
- *"Clinicians are the reason we all have jobs, and I thank them for all of their hard work."* (Business Applications Manager)
- *"It was very educational for me to see what the nurses and physicians do and how they use technology in their environment. It's always a good thing for people working in technology to understand the business they support. Glad I had the opportunity."* (Data Center Manager)
- *"I have worked at 4 different health care organizations in 3 different states and this is the first time I have seen a program like this. I am proud to work here."* (Application Analyst)